



CUSTOM FIELDS

**IN MICROSOFT DYNAMICS 365
BUSINESS CENTRAL**



USER SCENARIO DOCUMENTATION

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Change Log

Version number	Description
V1.0.0.0	Initial released version
V1.4.0.0	Support for sales/purchase documents and jobs. Misc. fixes to Dutch translations.
V1.6.0.0	Fixed issue where custom fields were not copied when sales/purchase document is created directly from customer/vendor.
V1.8.0.0	Update to support Dynamics 365 Business Central 2019 wave 2 Misc. fixes to translations.
V1.10.0.0	Added support for the following languages: - English (Canada) EULA link update
V1.12.0.0	Fixed incorrect error message for missing Sales Line Custom Field.

Introduction

The WSB Custom Fields extension allows you to easily create your own specific fields for customers, vendors, contacts and other entities. Each field can be set up with a field type for data entry, you can use customizable lists and can translate each custom field into your own language. The extension Custom Fields also supports synchronization of the custom fields between contacts, customers and vendors. This will enable you to maintain your data in one place and keep it in sync with the related data.

You can use your custom fields on sales/purchase headers & lines as well, for example on sales quotes or purchase orders and their lines. It is also possible to transfer the custom fields from a customer to a job or sales header, from a vendor to a purchase header and from an item to sales and purchase lines.

The WSB Custom Fields extension overall provides you with the following features:

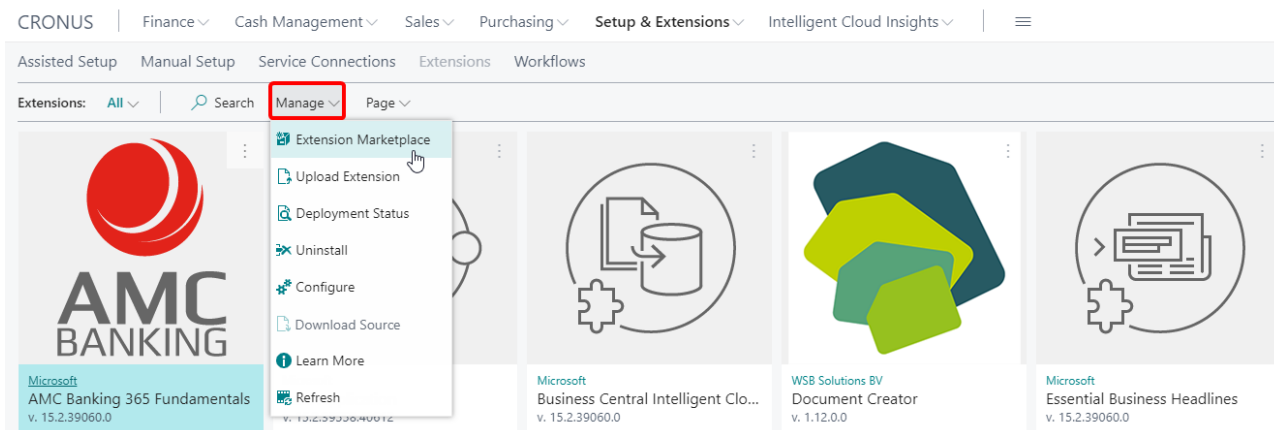
- ✓ Custom fields for the following entities: customers, vendors, contacts, jobs, items and resources
- ✓ Custom fields on the headers and lines of sales and purchase documents
- ✓ Up to 5 custom fields of each data type for each supported entity
- ✓ Synchronization of custom fields between contacts, customers and vendors
- ✓ Transfer fields from customers, vendors and items to jobs, sales/purchase headers and lines.
- ✓ Translate the caption of custom fields in other languages

The listed features will each be covered in the following chapters of this user documentation.

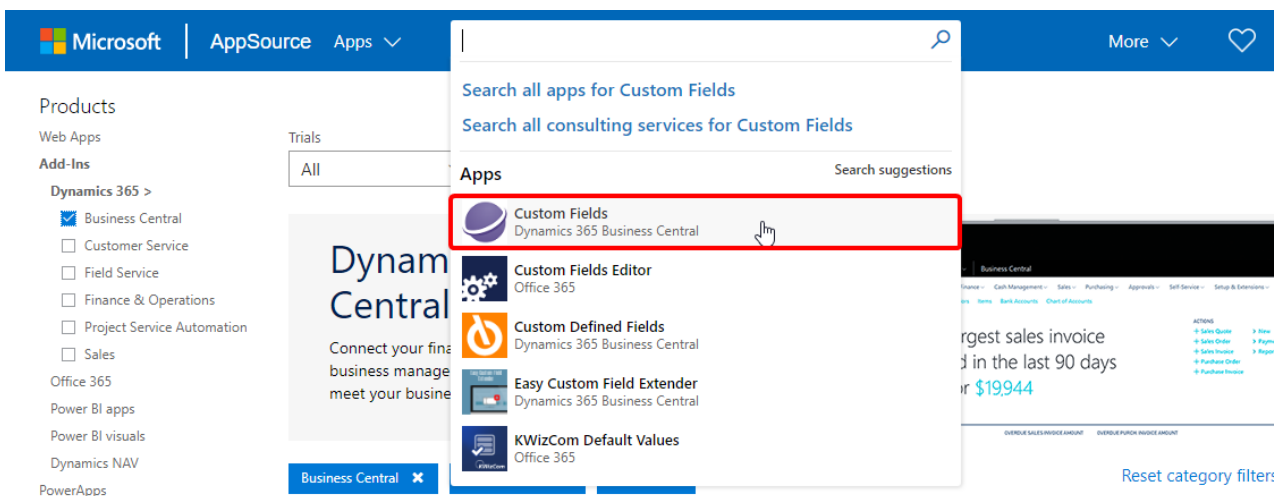
Installation

The WSB Custom Fields extension can be installed from the Extension Marketplace (AppSource). To install the extension, please follow the following steps:

1. In Microsoft Dynamics 365 Business Central, go to **Setup & Extensions > Extensions**
2. Open the Extension Marketplace (AppSource) via: **Manage > Extension Marketplace**



3. Search for and select "Custom Fields" (By WSB Solutions BV)



4. Please take note of the End-User License Agreement and Privacy Statement
5. Choose **GET IT NOW**, enter your details, and follow the further steps in the **Extension Installation** page that will open in Microsoft Dynamics 365 Business Central.

Apps > Custom Fields



Custom Fields [save for later](#)

WSB Solutions BV

★★★★★ 5.0 (2)

[Overview](#) [Reviews](#)

GET IT NOW

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Free

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[Dynamics 365 Business Central](#)

Publisher
WSB Solutions BV

Acquire Using
Work or school account

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Easily create your own custom fields for customers, vendors, contacts and more

Custom Fields

WSB Solutions

Easily create your own custom fields for customers, vendors, contacts, documents and more in Microsoft Dynamics 365 Business Central

Do you have customer data you can't register? Are you missing important contact or vendor information which is essential for your company business? And is there any sync between contacts, customers and vendors? Just some important issues Small to Midsize Businesses struggle with nowadays.

At the moment a lot of standard fields for entities like contacts, customers and vendors are provided, but what if you want to register company specific data for your company process in Microsoft Dynamics 365 Business Central? We have the perfect App to help you get more productive. With the use of the extension **Custom Fields** you can easily create your own specific fields for the customers, vendor and contacts. Each field can be set up with a field type for data entry, you can use customizable lists and can translate each custom field into your own language. The extension **Custom Fields** also supports synchronization of the custom fields between contacts, customers and vendors. This will enable you to maintain your data in one place and keep it synced with the related data. A time-saving and error-limiting functionality.

New features

With the latest version of **Custom Fields** it is possible to use the custom fields on sales headers & sales lines and purchase headers & purchase lines. You can create and use your own fields on for example sales quotes or purchase orders. A other new feature is the transfer of the custom fields from your customer to a job or sales header, from a vendor to a purchase header and from an item to sales and purchase lines.

Features and benefits

- Applicable for the entities customers, vendors, contacts, jobs, items and resources
- Applicable for the documents and lines for sales and purchase
- Create up-to 5 custom fields per field type for each entity
- Define the used field type of the custom field
- Synchronization of the custom fields between contacts, customers and vendors
- Transferring of fields from customer, vendors and items to jobs, sales documents & lines and purchase documents and lines
- Configurable in local language

Permissions Configuration

Once the WSB Custom Fields extension has been installed, the permission set CUSTOM FIELDS has been added to the system.

The screenshot shows the 'PERMISSION SETS' page in Microsoft Dynamics 365 Business Central. The table lists various permission sets, with 'CUSTOM FIELDS' highlighted. The right sidebar displays 'System Permissions' and 'Tenant Permissions' sections.

Permission Set ↑	Name	Type ↑	Extension Name
AMCBANKING365FLINDA	AmcBanking365Fundamentele Perm.	Extension	AMC Banking 365 Fundamentele
CUSTOM FIELDS	Custom Fields	Extension	Custom Fields
DOCUMENT CREATOR	Document Creator	Extension	Document Creator
ESSENTIALBUSINESSHEA	Essential Business Headlines	Extension	Essential Business Headlines
INTELLIGENTCLOUDBASE	Intelligent Cloud Base	Extension	Intelligent Cloud Base
INTELLIGENTCLOUDBC	Intelligent Cloud Business Cen	Extension	Business Central Intelligent Cloud
LATE PAYMENT PREDICT	Late payment prediction	Extension	Late Payment Prediction
MSWALLETSTANDARD	MSWallet Permissions	Extension	Microsoft Pay Payments
PAYPALSTANDARD	PayPalStandard Permissions	Extension	PayPal Payments Standard
PAYPALSTANDARDREAD	PayPalStandard Read Permission	Extension	PayPal Payments Standard
SALESANDINVENTORYFOR	Sales And Inventory Forecast	Extension	Sales and Inventory Forecast
WORLDPAYSTANDARD	WorldPayStandard Permissions	Extension	WorldPay Payments Standard
D365 ACC. PAYABLE	Dynamics 365 crediteuren	System	
D365 ACC. RECEIVABLE	Dyn. 365 debiteuren	System	
D365 ACCOUNTANTS	Dynamics 365 voor accountants	System	
D365 ADCS. EDIT	Dynamics 365 ADCS maken	System	
D365 ADCS. VIEW	Dynamics 365 ADCS weergeven	System	
D365 ASSEMBLY. EDIT	Dynamics 365 assemblage maken	System	
D365 ASSEMBLY. SETUP	Assemblage Dynamics 365-inst.	System	
D365 ASSEMBLY. VIEW	Dynamics 365 assemblage weerg.	System	
D365 BACKUP/RESTORE	Backup of herstel van database	System	
D365 BANKING	Dynamics 365 bankieren	System	
D365 BASIC	Dynamics 365 basistoegang	System	
D365 BASIC ISV	Dyn. 365 Basic ISV Acc.	System	
D365 BUS FULL ACCESS	Dyn. 365 voll. bedr.toegang	System	
D365 BUS PREMIUM	Dyn. 365 Prem. Bus. Full Acc.	System	

System Permissions

Object Type ↑	Object ID ↑	Object Name
(There is nothing to show in this view)		

Tenant Permissions

Object Type ↑	Object ID ↑	Object Name
Codeunit	70256951	WSB Cust. Fi
Codeunit	70256952	WSB Cust. Fi
Page	70256950	Custom Fiel
Page	70256951	WSB Custom
Page	70256952	Custom Fiel

This permission set should be assigned to relevant users or user groups.

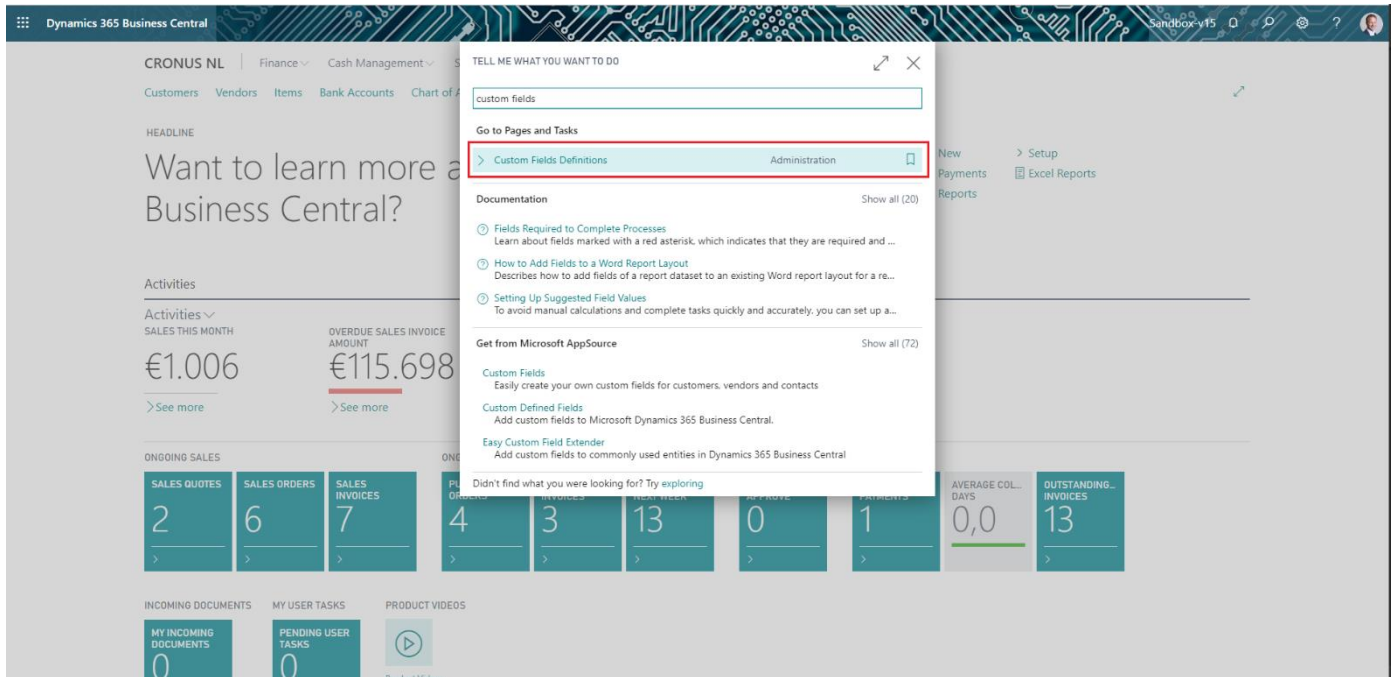
To assign the CUSTOM FIELDS permission set to users:

1. Choose the Lightbulb icon on the top right corner of the Microsoft Dynamics 365 Business Central to open search, enter **Users**, and then choose the related link.
2. Select the user that you want to assign permission to. Any permission sets that are already assigned to the user are displayed in the **Permission Sets** FactBox.
3. Choose the **Edit** action to open the **User Card** page.
4. On the **User Permission Sets** FastTab, on a new line, fill in the Permission Set field with CUSTOM FIELDS

For more information, please refer to Dynamics 365 Business Central documentation - [Managing Users and Permissions](#)

Setup and Usage

Search for the *Custom Fields Definitions* page to start custom fields configuration:

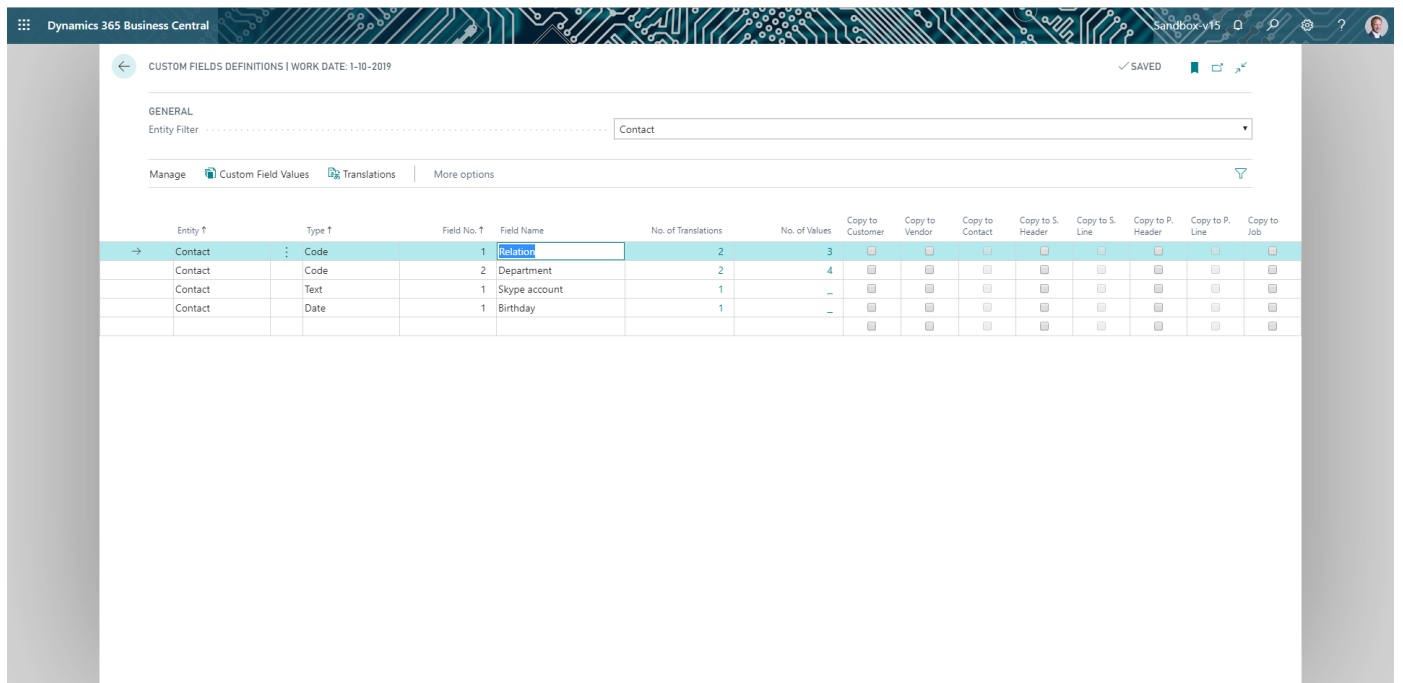


From the Custom Field Definitions page, it is possible to configure up to 5 custom fields for different data types for contacts, customers, vendors, items and jobs.

Scenario 1: Custom fields on contacts

To set up custom fields for contacts:

1. Choose the Contact as Entity Filter on the Custom Field Definitions page.
2. Add a new line, change the Type field to the appropriate one. The system will predefine Field No. but user can change it. The Field Name is mandatory to specify.
3. When the line inserted, the system will automatically add English (ENU) caption of the custom field. This default caption is the same as field name.



← CUSTOM FIELDS DEFINITIONS | WORK DATE: 1-10-2019

✓ SAVED

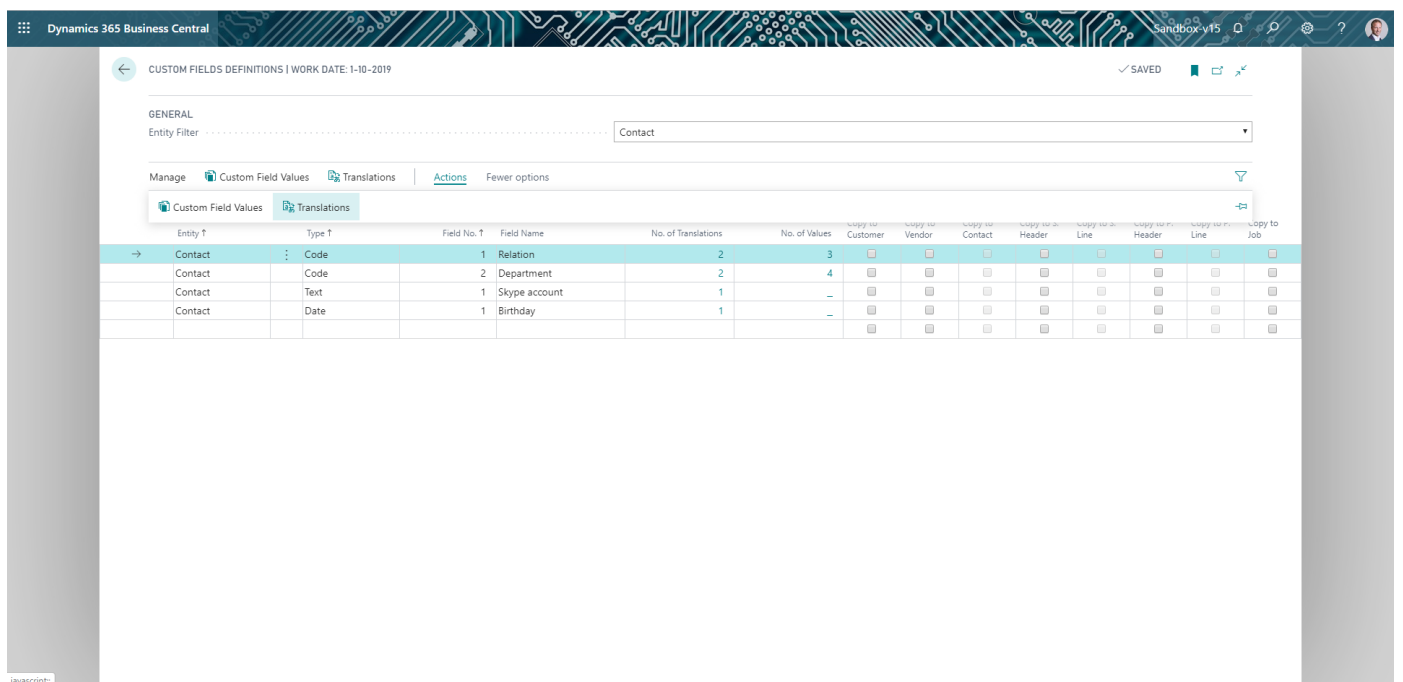
GENERAL

Entity Filter: Contact

Manage Custom Field Values Translations More options

Entity ↑	Type ↑	Field No. ↑	Field Name	No. of Translations	No. of Values	Copy to Customer	Copy to Vendor	Copy to Contact	Copy to S. Header	Copy to S. Line	Copy to P. Header	Copy to P. Line	Copy to Job
→ Contact	Code	1	Relation	2	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Code	2	Department	2	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Text	1	Skype account	1	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Date	1	Birthday	1	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The user can add captions for other relevant languages in WSB Custom Fields Translations page which is accessible from Actions:



← CUSTOM FIELDS DEFINITIONS | WORK DATE: 1-10-2019

✓ SAVED

GENERAL

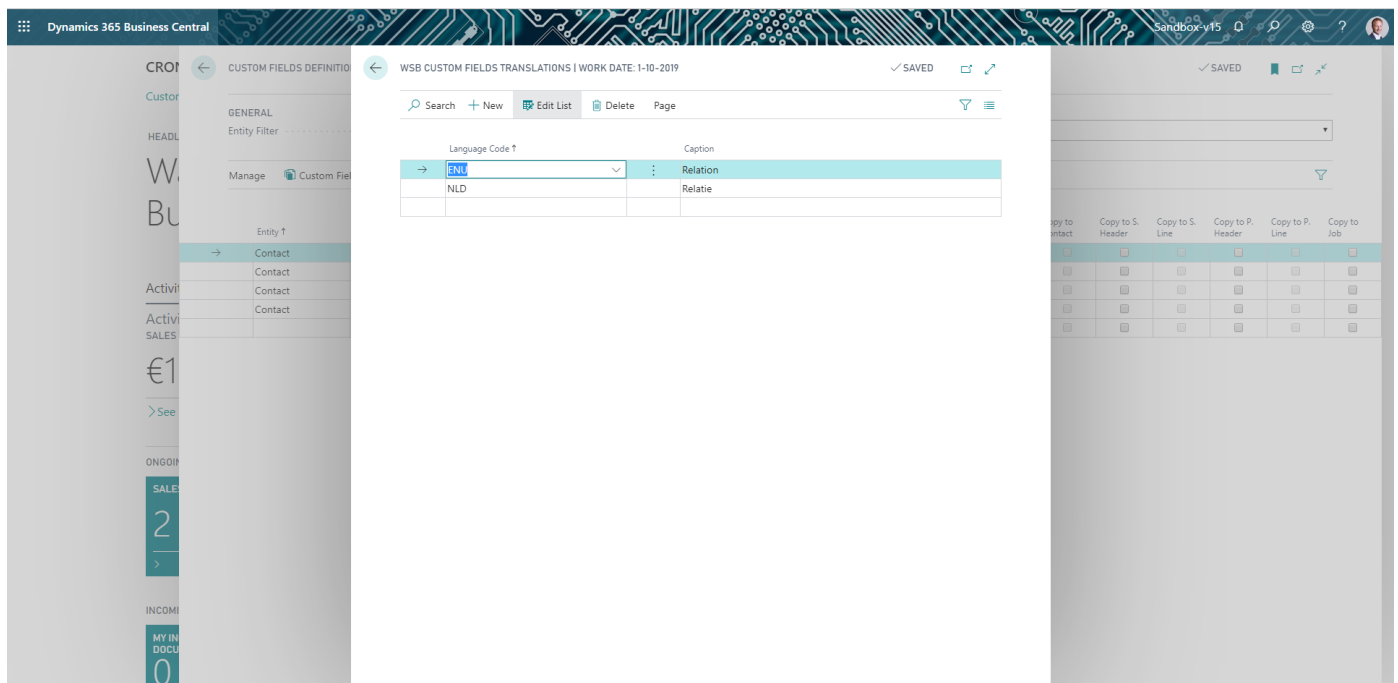
Entity Filter: Contact

Manage Custom Field Values Translations Actions Fewer options

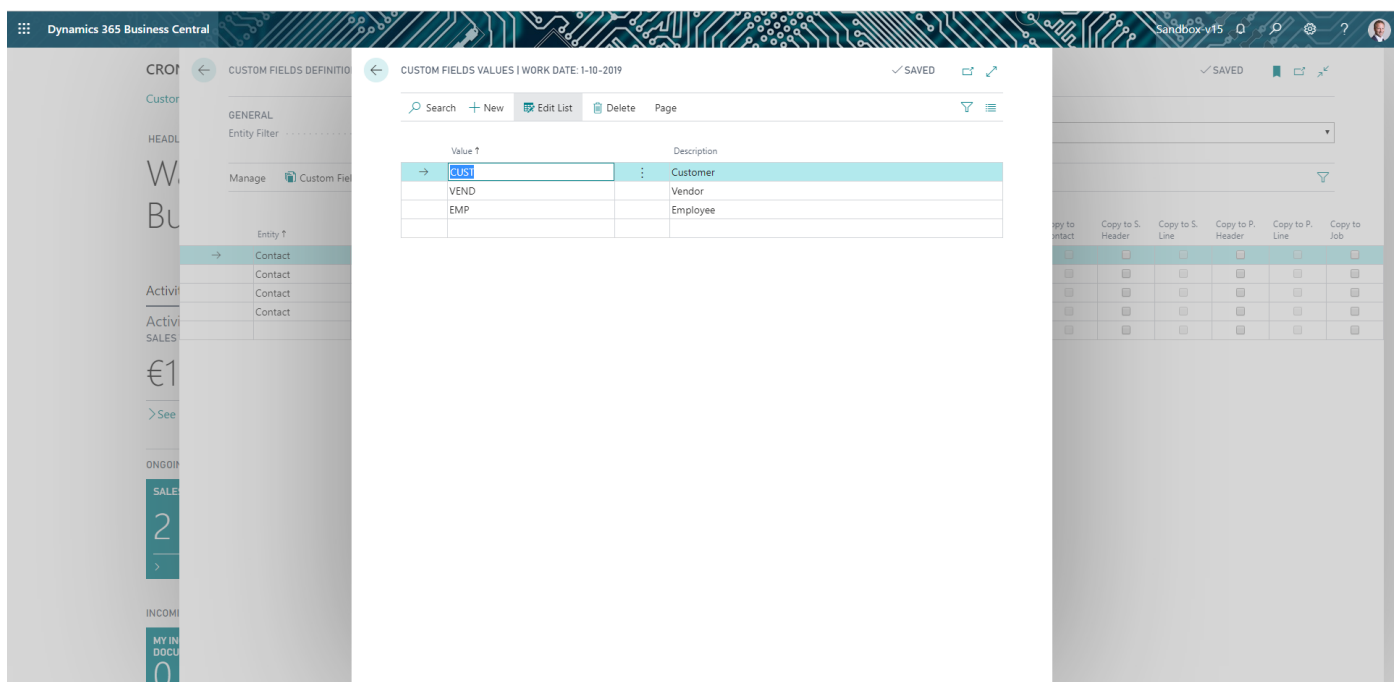
Custom Field Values Translations

Entity ↑	Type ↑	Field No. ↑	Field Name	No. of Translations	No. of Values	Copy to Customer	Copy to Vendor	Copy to Contact	Copy to S. Header	Copy to S. Line	Copy to P. Header	Copy to P. Line	Copy to Job
→ Contact	Code	1	Relation	2	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Code	2	Department	2	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Text	1	Skype account	1	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Date	1	Birthday	1	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The example below shows captions in English and Dutch languages defined for the same custom field:



For custom fields of Code type, it is possible to set up values using Custom Field Values page accessible from Actions on the Custom Fields Definitions page:



After users logout and login again, the newly defined custom fields will be available on the list and card page (Custom Fields fasttab) of the contacts:

Dynamics 365 Business Central | WORK DATE: 1-10-2019

Search New Manage Process Contact Page More options

No.	Phone No.	Email	Salesperson Code	Territory Code	Relation	Department	Skype account	Birthday
CT000024			HD					
CT000023			HD					
CT000001		adatum.corporation@contoso...	KS					
CT000002		loek.walravens@contoso.com	KS					
CT000007		alpine.ski.house@contoso.com	KS	BUITENLAND	CUST	SALES		20-3-19
CT000008		ian.deberry@contoso.com	KS	BUITENLAND				
CT000011		fabrikam.inc@contoso.com	DB	BUITENLAND				
CT000012		krystal.york@contoso.com	DB	BUITENLAND				
CT000013		first.up.consultants@contoso.c...	DB					
CT000014		stern.westerink@contoso.com	DB					
CT000015		graphic.design.institute@cont...	DB	BUITENLAND				
CT000016		bryce.jasso@contoso.com	DB	BUITENLAND				
CT000028		klockefeer@wsb-solutions.nl						
CT000019		nod.publishers@contoso.com	DB					
CT000020		bart.vanderschans@contoso.co...	DB					
CT000027			HD					
CT000021		rabobank@contoso.com	HD					
CT000022		rabobank@contoso.com	HD					
CT000025			HD					
CT000026			HD					
CT000009		relecloud@contoso.com	KS					

Details Attachments (0)

Contact Statistics

GENERAL

Cost (LCY) 672.00
Duration (Min.) 84

OPPORTUNITIES

No. of Opportunities 3
Estimated Value (LCY) 10,450.00
Calcd. Current Value (LCY) 200.00

SEGMENTATION

No. of Job Responsibilities 0
No. of Industry Groups 0
No. of Business Relations 1
No. of Mailing Groups 0

https://businesscentral.dynamics.com/Sandbox-v15?company=CRONUS%20NL&uniframe=1#

Custom fields on Contacts List page

Dynamics 365 Business Central | WORK DATE: 1-10-2019

CONTACT CARD | WORK DATE: 1-10-2019

Process Report More options

CT000007 · Alpine Ski House

Foreign Trade >

Profile Questionnaire Manage

Question	Answer	Questions Answered (%)	Last Date Updated
(There is nothing to show in this view)			

Custom Fields

Relation CUST Birthday 20-3-1988

Department SALES

Skype account

Details Attachments (0)

Contact Picture

Contact Statistics

GENERAL

Cost (LCY) 672.00
Duration (Min.) 84

OPPORTUNITIES

No. of Opportunities 3
Estimated Value (LCY) 10,450.00
Calcd. Current Value (LCY) 200.00

SEGMENTATION

No. of Job Responsibilities 0
No. of Industry Groups 0
No. of Business Relations 1
No. of Mailing Groups 0

Custom fields on the Contact Card page

The values defined for the custom field are available in the lookup but not mandatory to select.

The screenshot shows the 'CONTACT CARD' for 'Alpine Ski House' (CT000007) in Microsoft Dynamics 365 Business Central. The 'Foreign Trade' section is active, showing a 'Profile Questionnaire' table with columns for Question, Answer, Questions Answered (%), and Last Date Updated. Below this, a 'Custom Fields' section is visible. A lookup menu is open for the 'Relation' field, showing a table with columns 'Value' and 'Description'. The table contains three entries: 'CUST' (Customer), 'EMP' (Employee), and 'VEND' (Vendor). The 'CUST' entry is selected. The 'Relation' field is set to 'CUST', and the 'Department' is set to 'SALES'. The 'Birthday' field is set to '20-3-1988'. The 'Contact Picture' field is empty. The 'Contact Statistics' section on the right shows various metrics for the contact, including 'GENERAL' (Cost (LCY) 672.00, Duration (Min.) 84), 'OPPORTUNITIES' (No. of Opportunities 3, Estimated Value (LCY) 10450.00, Calcd. Current Value (LCY) 200.00), and 'SEGMENTATION' (No. of Job Responsibilities 0, No. of Industry Groups 0, No. of Business Relations 1, No. of Mailing Groups 0).

Value	Description
CUST	Customer
EMP	Employee
VEND	Vendor

Field	Value
Relation	CUST
Department	SALES
Skype account	
Birthday	20-3-1988

Scenario 2: Synchronization of custom fields between contacts and customers

WSB Custom Fields extension enables possibility to synchronize values of the same type and the same field number between contacts and customers (also between contacts and vendors) when these records are linked to each other (using Contact Business Relation).

To set up synchronization for custom field of type Code between contacts and customers:

1. Set up custom fields for contact entity as described in Scenario 1.
2. Choose the Customer as Entity Filter on the Custom Field Definitions page.
3. Add custom fields and set Copy to Contact checkbox on the fields which should be kept in synchronization with contact:

Microsoft Dynamics 365 Business Central | CUSTOM FIELDS DEFINITIONS | WORK DATE: 1-10-2019 | SAVED

GENERAL
Entity Filter: Customer

Manage Custom Field Values Translations Actions Fewer options

Copy to Contact
Specifies if a value of this custom field is copied to the linked contact records. Can be defined for customers or vendors.
Press Ctrl+F1 to learn more

Entity ↑	Type ↑	Field No. ↑	Field Name	No. of Translations	No. of Values	Copy to Customer	Copy to Vendor	Copy to Contact	Copy to S. Header	Copy to S. Line	Copy to P. Header	Copy to P. Line	Copy to Job
→ Customer	Code	1	Relation	2	3	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	Code	2	Customer Type	2	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	Text	1	Website	2	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	Boolean	1	Establishment within EU	1	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

https://businesscentral.dynamics.com/Sandbox-v15?company=CRONUS NL&runiframe=1#

After the configuration is completed, the system will keep synchronized values if custom fields modified on a contact or customer:

Microsoft Dynamics 365 Business Central | CONTACT CARD | WORK DATE: 1-10-2019 | SAVED

CT000007 · Alpine Ski House

Process Report More options

Foreign Trade >

Profile Questionnaire Manage

Question	Answer	Questions Answered (%)	Last Date Updated
(There is nothing to show in this view)			

Custom Fields

Relation: CUST Birthday: 20-3-1988

Department: SALES

Skype account:

Details Attachments (0)

Contact Picture

Contact Statistics

GENERAL

Cost (LCY) 672.00

Duration (Min.) 84

OPPORTUNITIES

No. of Opportunities 3

Estimated Value (LCY) 10,450.00

Calcd. Current Value (LCY) 200.00

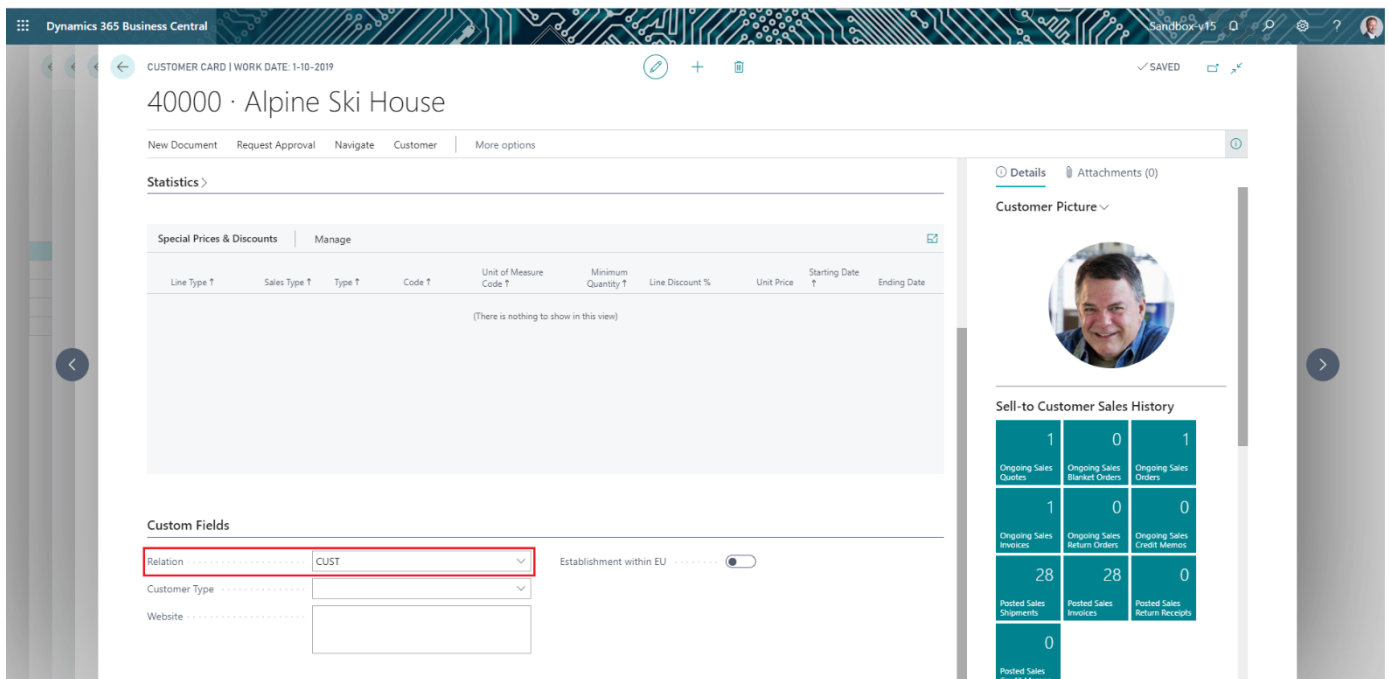
SEGMENTATION

No. of Job Responsibilities 0

No. of Industry Groups 0

No. of Business Relations 1

No. of Mailing Groups 0



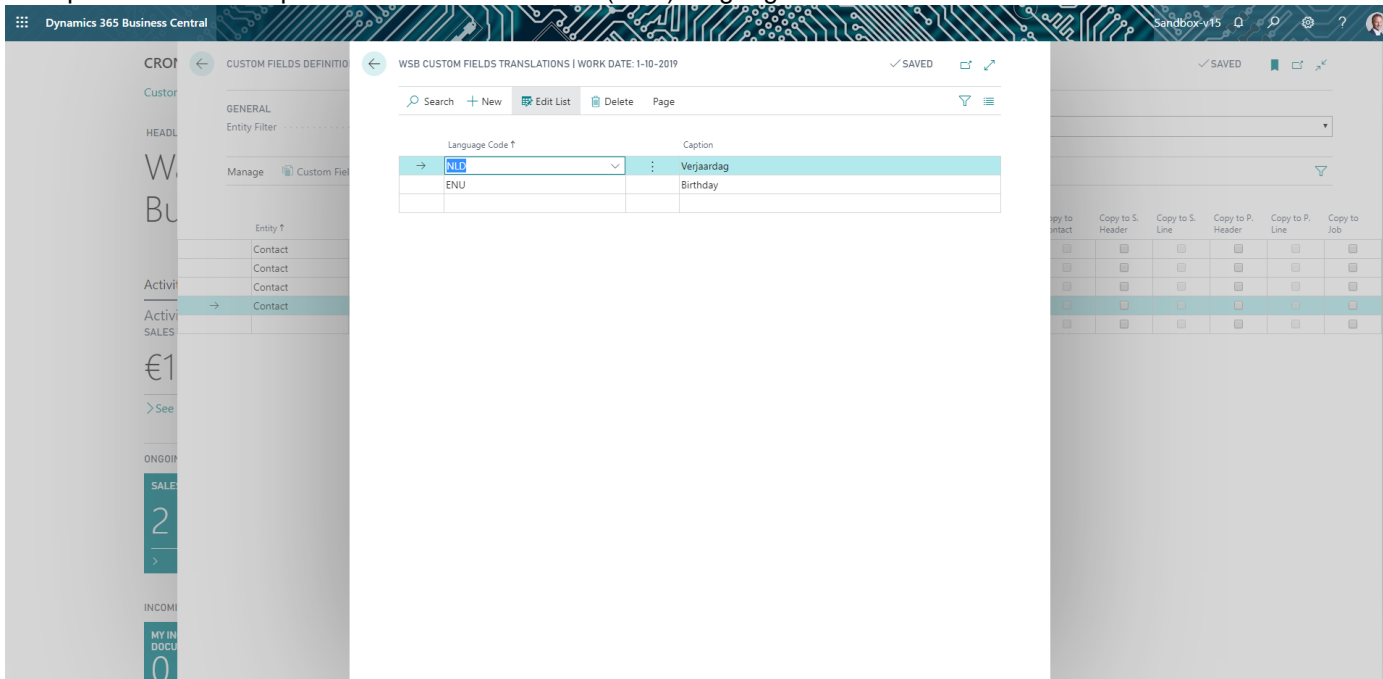
The screenshot shows the 'CUSTOMER CARD' for '40000 · Alpine Ski House' with a work date of 1-10-2019. The interface includes a 'Statistics' section, a 'Special Prices & Discounts' table (currently empty), and a 'Custom Fields' section. In the 'Custom Fields' section, the 'Relation' field is set to 'CUST' and is highlighted with a red box. Other fields include 'Customer Type' and 'Website'. On the right, there is a 'Customer Picture' and a 'Sell-to Customer Sales History' table.

Line Type ↑	Sales Type ↑	Type ↑	Code ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Line Discount %	Unit Price	Starting Date ↑	Ending Date
(There is nothing to show in this view)									

Sell-to Customer Sales History		
1	0	1
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
1	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
28	28	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0		
Posted Sales Credit Memos		

Scenario 3: Custom fields in Dutch (Netherlands) system language

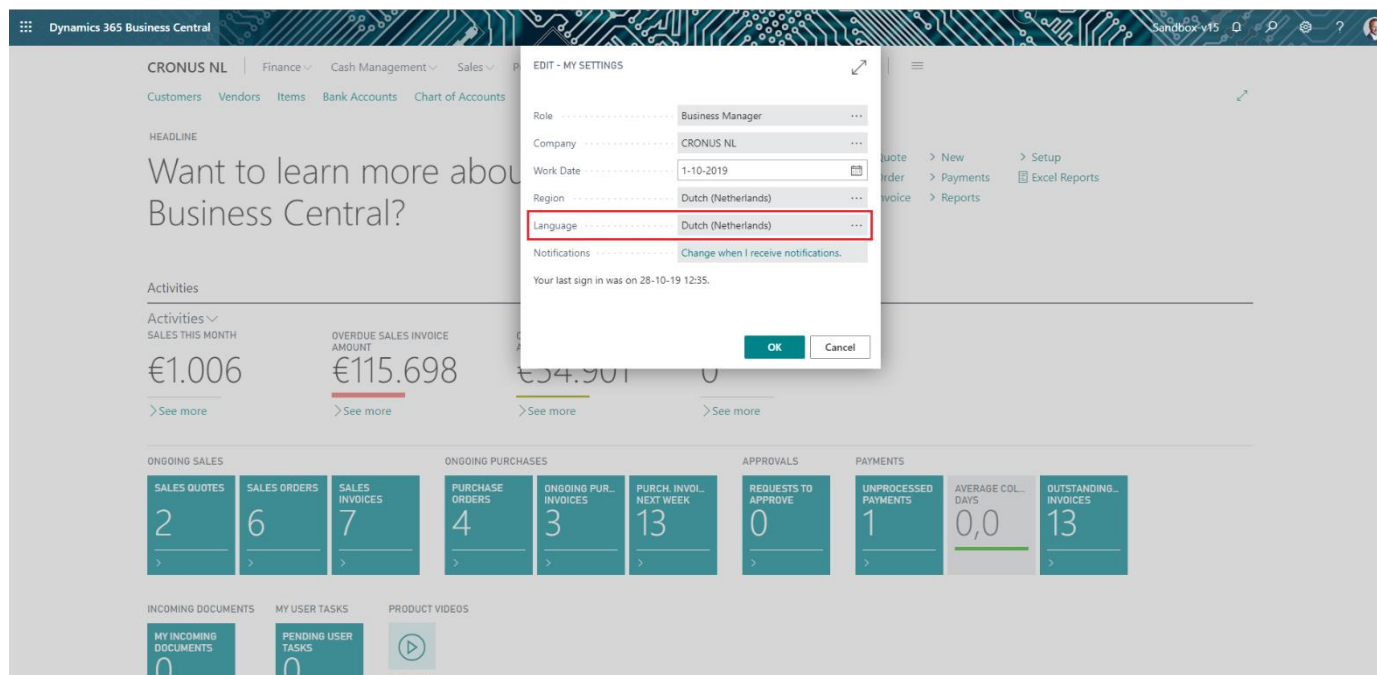
1. Set up custom fields caption translations for Dutch (NLD) language:



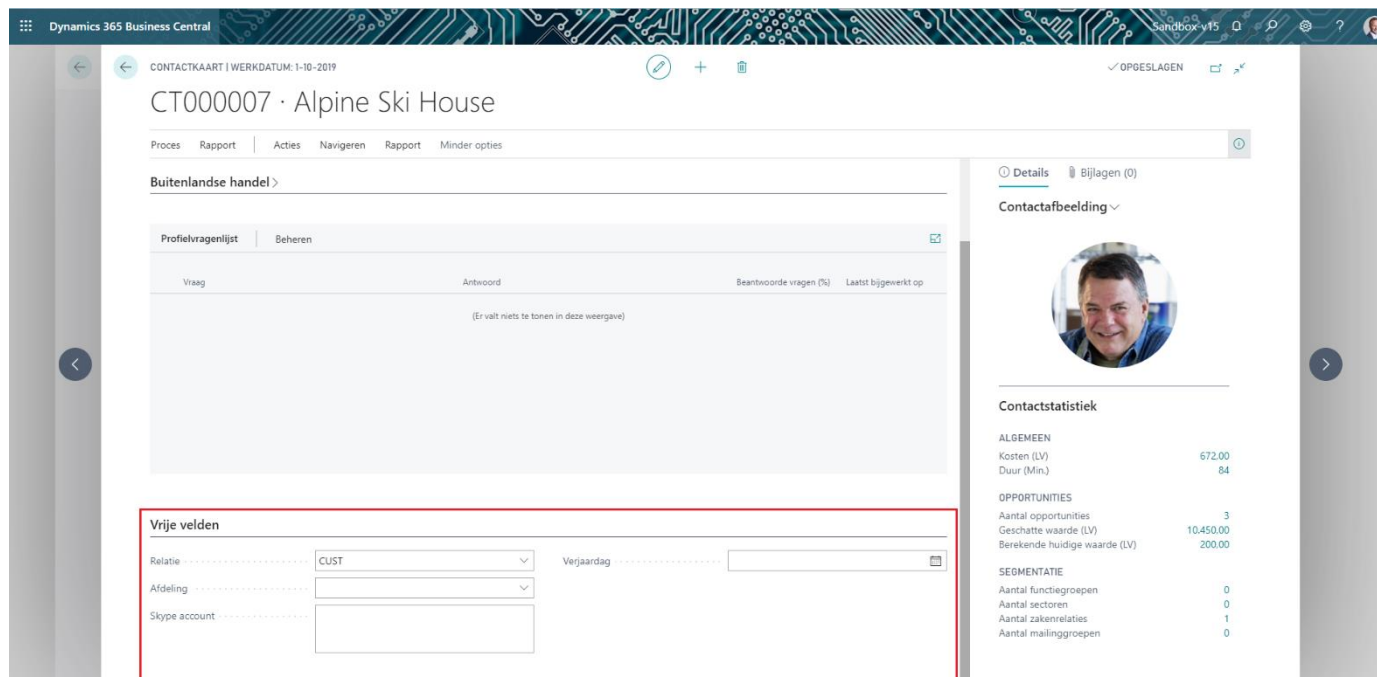
The screenshot shows the 'CUSTOM FIELDS DEFINITION' page with a work date of 1-10-2019. The 'GENERAL' tab is active, showing a table for 'WSB CUSTOM FIELDS TRANSLATIONS'. The table has columns for 'Language Code' and 'Caption'. The first row shows 'NLD' (Dutch) with the caption 'Verjaardag' (Birthday). The second row shows 'ENU' (English) with the caption 'Birthday'.

Language Code ↑	Caption
NLD	Verjaardag
ENU	Birthday

2. Open My Settings page and change Language to Dutch (Netherlands):



- After the language of the Microsoft Dynamics 365 Business Central changed, open the contact card and custom fields are shown according to captions defined for NLD language layer in Custom Fields Definitions:

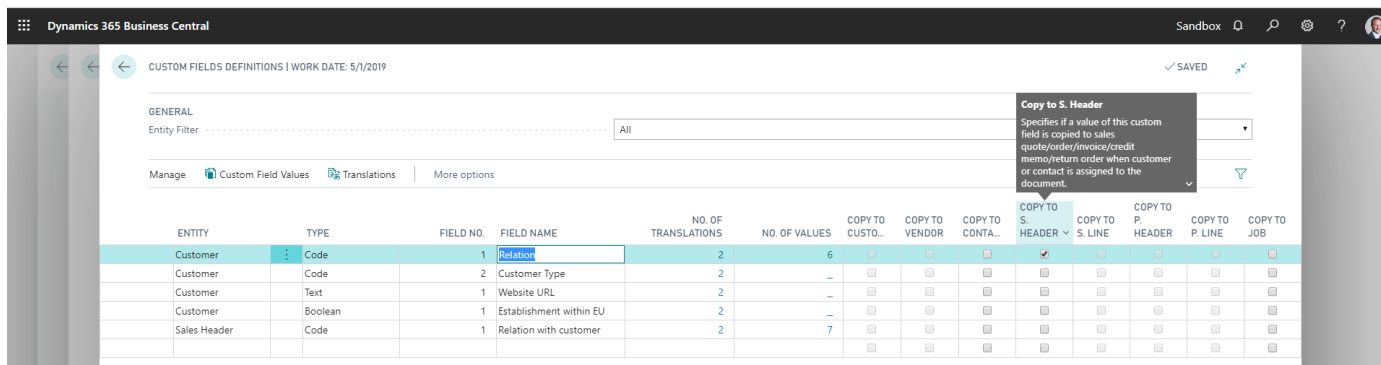


Scenario 4: Synchronization of custom fields between contacts, customers & vendors and their documents and jobs

WSB Custom Fields extension enables possibility to transfer values of a contact, customer or vendor to the header of their documents, like sales quote and purchase order or jobs (only for customer).

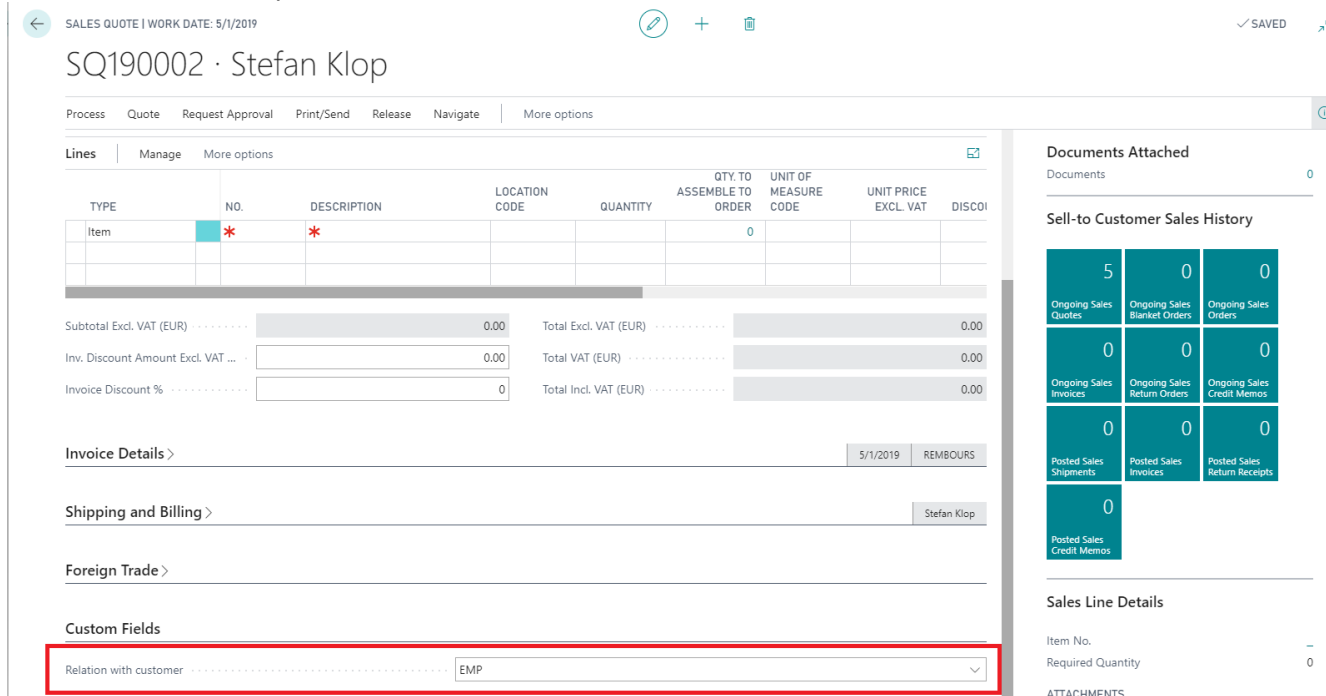
To set up transferring of a custom field of type Code from a customer to the header of a sales quote.

1. Set up custom fields for Sales Header entity as described in Scenario 2.
2. Choose the Customer as Entity Filter on the Custom Field Definitions page.
3. Add custom fields and set Copy to S. Header checkbox (sales header) on the fields which should be transferred to the sales quote:



ENTITY	TYPE	FIELD NO.	FIELD NAME	NO. OF TRANSLATIONS	NO. OF VALUES	COPY TO CUSTO...	COPY TO VENDOR	COPY TO CONTA...	COPY TO S. HEADER	COPY TO S. LINE	COPY TO P. HEADER	COPY TO P. LINE	COPY TO JOB
Customer	Code	1	Relation	2	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	Code	2	Customer Type	2	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	Text	1	Website URL	2	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	Boolean	1	Establishment within EU	2	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Header	Code	1	Relation with customer	2	7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

After the configuration is completed, the system will keep transfer the values if the customer is used as a sell-to customer in the sales quote.



SALES QUOTE | WORK DATE: 5/1/2019

SQ190002 · Stefan Klop

Process Quote Request Approval Print/Send Release Navigate More options

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	QTY. TO ASSEMBLE TO ORDER	UNIT OF MEASURE CODE	UNIT PRICE EXCL. VAT	DISCOI
Item	*	*			0			

Subtotal Excl. VAT (EUR) 0.00 Total Excl. VAT (EUR) 0.00

Inv. Discount Amount Excl. VAT ... 0.00 Total VAT (EUR) 0.00

Invoice Discount % 0 Total Incl. VAT (EUR) 0.00

Invoice Details > 5/1/2019 REMBOURS

Shipping and Billing > Stefan Klop

Foreign Trade >

Custom Fields

Relation with customer EMP

Documents Attached 0

Sell-to Customer Sales History

5	0	0
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
0	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
0	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0		
Posted Sales Credit Memos		

Sales Line Details

Item No. -

Required Quantity 0

ATTACHMENTS

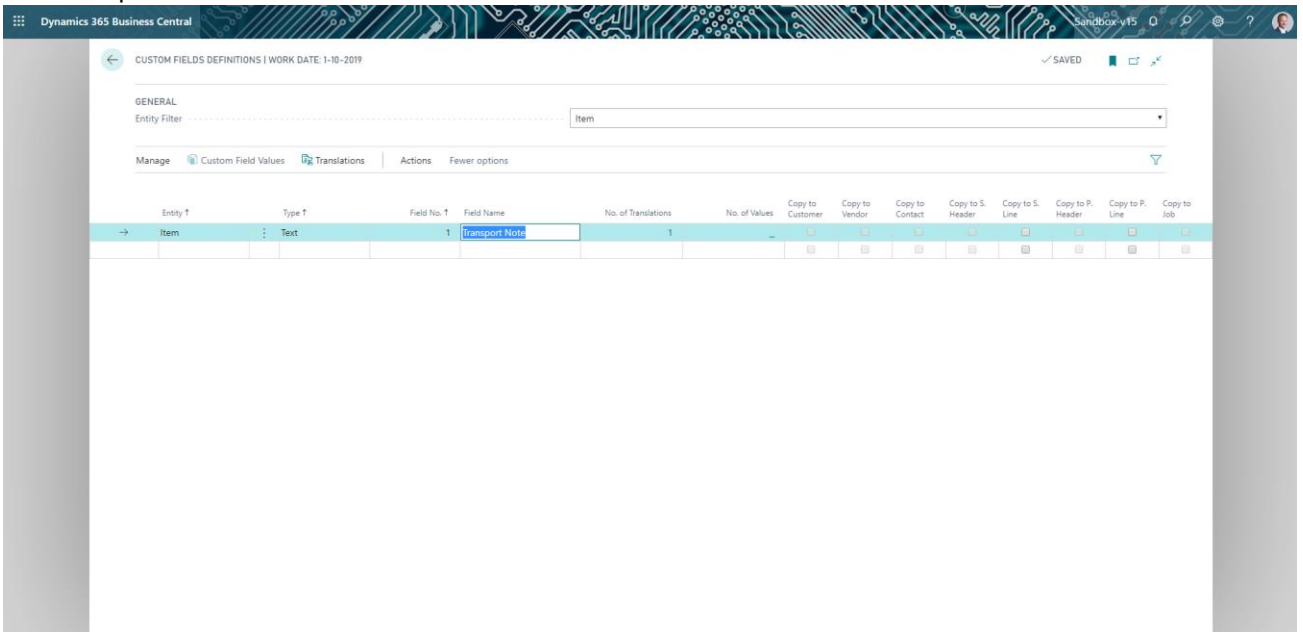
This same case is applicable for transferring values from vendors to purchase documents and customers to jobs.

Scenario 5: Synchronization of custom fields between items and sales & purchase lines

WSB Custom Fields extension enables possibility to transfer values of an item to a sales or purchase line

To set up transferring for a custom field of type Text from an item to a sales order line.

1. Choose the Item as Entity Filter on the Custom Field Definitions page.
2. Add a new line, change the Type field to Text. The system will predefine Field No. but user can change it. Specify the Field Name as Transport Note
3. When the line inserted, the system will automatically add English (ENU) caption of the custom field. This default caption is the same as field name.



CUSTOM FIELDS DEFINITIONS | WORK DATE: 1-10-2019

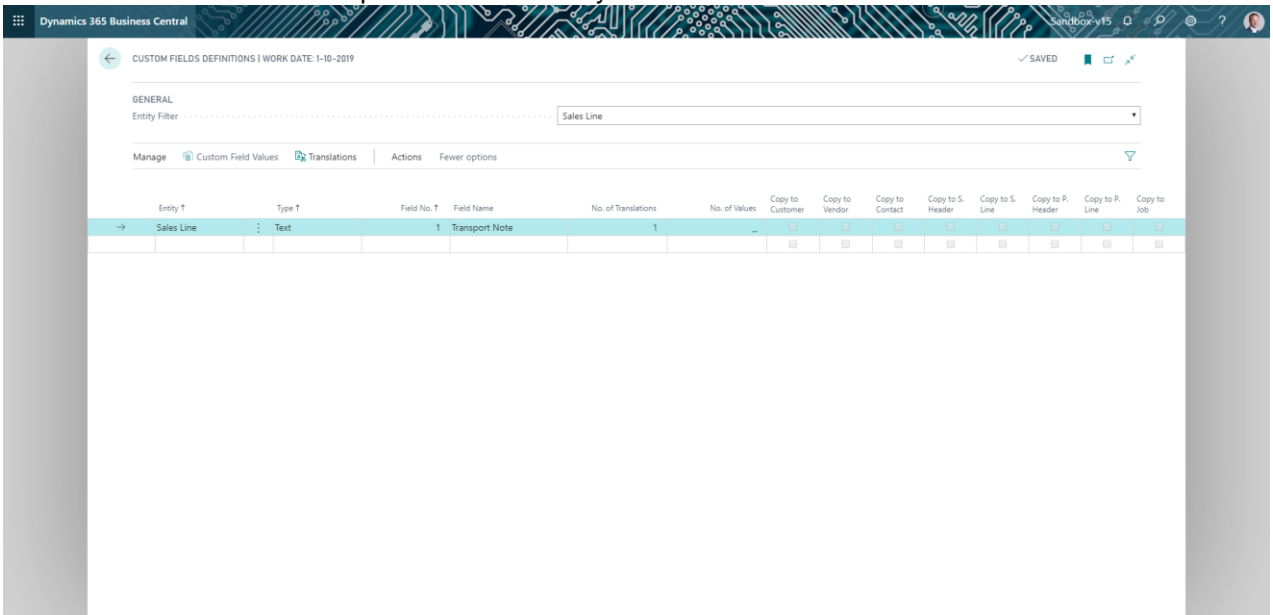
GENERAL

Entity Filter: Item

Manage Custom Field Values Translations Actions Fewer options

Entity	Type	Field No.	Field Name	No. of Translations	No. of Values	Copy to Customer	Copy to Vendor	Copy to Contact	Copy to S. Header	Copy to S. Line	Copy to P. Header	Copy to P. Line	Copy to Job
Item	Text	1	Transport Note	1									

4. Create the same field from step 1 till 3 for the Entity filter Sales line



CUSTOM FIELDS DEFINITIONS | WORK DATE: 1-10-2019

GENERAL

Entity Filter: Sales Line

Manage Custom Field Values Translations Actions Fewer options

Entity	Type	Field No.	Field Name	No. of Translations	No. of Values	Copy to Customer	Copy to Vendor	Copy to Contact	Copy to S. Header	Copy to S. Line	Copy to P. Header	Copy to P. Line	Copy to Job
Sales Line	Text	1	Transport Note	1									

5. Choose the Item as Entity Filter on the Custom Field Definitions page.

- Copy to S. Line checkbox (sales line) on the field created at step 1 which should be transferred to the sales order line

- Open an Item card and fill in the custom field *Transport Note* on the FastTab *Custom Fields*

- Create a Sales Order and enter the Item used on step 7 in the Sales lines

9. The custom field filled in step 7 is transferred to the sales line

Dynamics 365 Business Central

SALES ORDER | WORK DATE: 1-10-2019

101004 · Alpine Ski House

Process Release Posting Prepare Order Request Approval Print/Send Navigate More options

General > 13-5-2019 13-5-2019 13-6-2019

Lines Manage More options

Type	Qty. Assigned	Planned Delivery Date	Planned Shipment Date	Shipment Date	Department Code	Customergro... Code	Transport Note
Item	1	14-5-2019	13-5-2019	13-5-2019			
→ Item	1	14-5-2019	13-5-2019	13-5-2019			Deliver face-up

Subtotal Excl. VAT (EUR) 1,578.80 Total Excl. VAT (EUR) 1,578.80

Inv. Discount Amount Excl. VAT 0.00 Total VAT (EUR) 0.00

Invoice Discount % 0 Total Incl. VAT (EUR) 1,578.80

Invoice Details > 1M82D

Shipping and Billing > 11-9-2019

Foreign Trade >

Details Attachments (0)

Sell-to Customer Sales History

Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
1	0	1
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
1	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
28	28	0
Posted Sales Credit Memos		
0		

Customer Details >

Customer No. 40000

Name Alpine Ski House

Phone No.

Email ian.deberry@contoso.com

Fax No.

Credit Limit (LCY) 0.00

Available Credit (LCY) 0.00